frontstream WORKPLACE PHILANTHROPY

CONTINUOUS GIVING CAMPAIGN CONFIGURATION

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frontstream WORKPLACE PHILANTHROPY

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Introduction

Continuous Giving campaigns provide the opportunity for a donor's donation and designation distributions to carry over to a new campaign from a previous campaign. This option is primarily for payroll donations, but can also be used for cash, electronic checks, standard checks, direct bills, stocks, and PayPal payment types; however, Continuous Giving cannot be used for credit or debit card transactions because credit card information is not stored in the system. By default, the Welcome page on the donor site will not display to donors with unconfirmed donations (unless selected otherwise). Instead, upon logging into a SPE or DPE campaign, the donor will be directed to the Confirmation Page, where they can confirm, edit, increase, or cancel their pledge; or upon logging into an IPE campaign, the donor will be directed to their cart. The options that display on the donor site are as followed:

- **Continue with my pledge as shown.** – If this option is chosen, the donor will be directed to the Donor Information page, where they can respond to the acknowledgement questions or edit their personal information.

- **Change my pledge and/or designations.** – If this option is selected, the donor will be directed to the Select Payment Type page. Then the donor will proceed with the regular donation process.

- **I do not wish to contribute this year. Cancel my pledge.** – If this option is chosen, the donor's unconfirmed donation will become a confirmed "**No Donation**" payment type.

Continuous Giving donation and designation information can be created using **one of the following methods**:

1. Utilizing the **Carry Over Tool**

    a. Current employees are associated to a new campaign.
    b. Last year's campaign is associated to the new campaign on the Campaign Settings page.
    c. The carry over tool pulls in donation and designation information from a previous campaign, according to the criteria you establish.

OR

2. Uploading donation and designation information using the **Donation Import**

    a. Donors can be created as new donor records or existing donors can be associated to the campaign.

b. All donation and designation information is created from an import file.
c. Donations can be loaded as "confirmed" or "unconfirmed" in the donation import.

Note: If Campaign Management was used in a previous year to record donations the Carry Over tool is the recommended method for creating Continuous Giving Campaigns because it is the most straightforward way to bring last year's gift into a current campaign.

Steps to Setting up a Continuous Giving Campaign

1. Configure Option Sets

Option Sets contain the business rules for your campaign. There are seven different Option Sets, and once all needed Option Sets are configured, they are bundled together into an Option Package. The entire Option Package is then associated to your campaign, but can be overridden by the donor group settings.

Note: If you do not set up a Continuous Giving Option Set donors will not have the option to confirm/change their pledge. A donor's previous gift will just be carried over into the regular payroll options.

For Continuous Giving Campaigns, the following Option Sets must be configured:

a. Payment Types*
b. Designation*
c. Panel
d. Continuous Giving

*Required for all campaigns.

Payment Type Option Set Configuration

For each campaign, at least one **Payment Type Option Set** must be configured. Optionally, if your campaign requires that donor groups see different payment option, a customized experience can be offered by configuring multiple payment sets. The following can be unique for each donor group:

- Type of gift option presented, including cash, credit card, debit card, electronic check, check, direct bill, stock, PayPal, and no donation
- Minimum total annual donation accepted
- Billing start dates

For more information on configuring payment types, please see further documentation, *The New Admin's Guide to Campaign Management*.

Note: You must provide the same payment types and payment amount types (dollars, dollars per pay period, etc) as you did the in the previous year's campaign in order for donors to increase their gifts in Continuous Giving campaigns.

Note: Payment type add-ons are currently not supported in the Dynamic Pledge Experience (DPE).

Designation Option Set Configuration

The **Designation Option Set** affects designations options on the Primary Designation Panel for online donors. This option set is required for all campaigns.

For details on configuring the Designation Option Set, please see further documentation, *The New Admin's Guide to Campaign Management.*

Panel Option Set Configuration

The **Panel Option Set** contains business rules that determine the maximum item count and type of designation entity allowed on the Designation Panel. This option set is not available for IPE campaigns, but is required for both SPE and DPE campaigns.

For details on configuring the Panel Option Set, please see further documentation, *The New Admin's Guide to Campaign Management.*

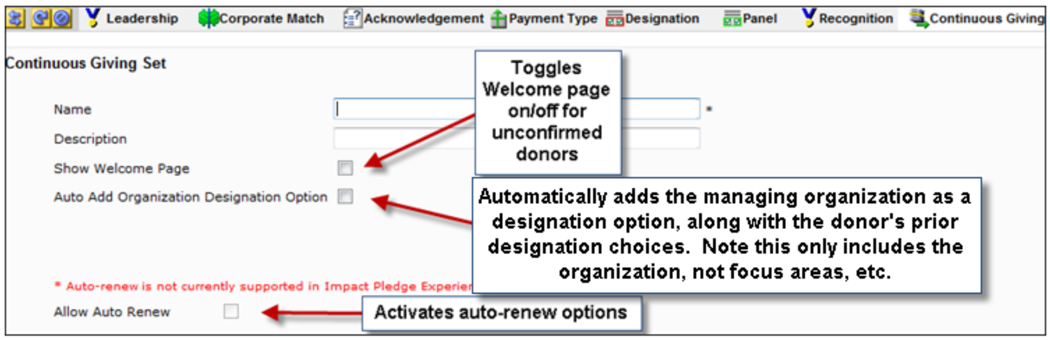
Continuous Giving Option Set Configuration

The **Continuous Giving Option Set** establishes confirmation increase options and auto-renew options for continuous giving campaigns. Once created, the Continuous Giving Option Set is bundled into an Option Package, along with other option sets, and applied to a campaign or specific donor groups. Features of the Continuous Giving Option Set include:

- The ability to toggle the Welcome page off/on
- Confirmation increase options
- Pledge auto-renew capabilities and increase options

To set up a Continuous Giving Option Set, take the following steps:

1. From the Organization level, expand Option Sets > Continuous Giving.
2. Click Add a new continuous giving set.
3. Fill in the appropriate information in the fields provided.



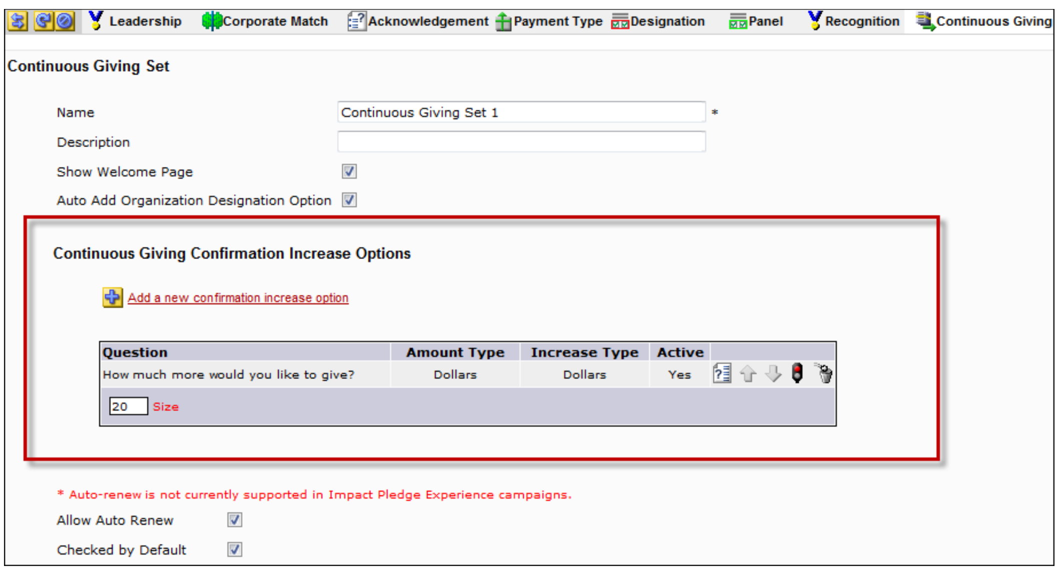
Continuous Giving Set Fields		
Req	Field	Description
*	Name	This name will be used to identify the Continuous Giving Set.
	Description	Can be the same as the name or can be used to provide additional details.
	Show Welcome Page	Offers the ability to toggle the Welcome Page for donors with unconfirmed donations. By default, the Welcome Page is not visible to unconfirmed donors; instead unconfirmed donors are shown the donation summary page.
	Auto Add Organization Designation Option	Offers the ability to have the system automatically add the managing organization as a designation option on the donor’s confirmation page.
	Allow Auto Renew	Offers the ability to allow the donor to opt in/out of having their donation auto-renewed in the next campaign. This is used if the company does not have an “across the board” rollover policy.

4. Click Save / Update.

To offer add-on options to the donor, continue the remaining steps:

1. After saved, options to configure the Continuous Giving Confirmation Increase Options will display on the page. If continuous giving increase options are set up, donors with unconfirmed donations will only be presented with increase options that match the payment amount type of their previous year's donation. Click Add a new confirmation increase option if you wish to utilize this option.

   Note: You must configure one question for each payment amount type option from the previous year's campaign, in order for donors to increase their gifts in Continuous Giving campaigns. For instance, if the donor gave via the amount type "**dollars**," you will need to configure an increase question with the amount type of "**dollars**," as shown below. Donors will only see the payment type increase option that they used in the previous year's campaign.

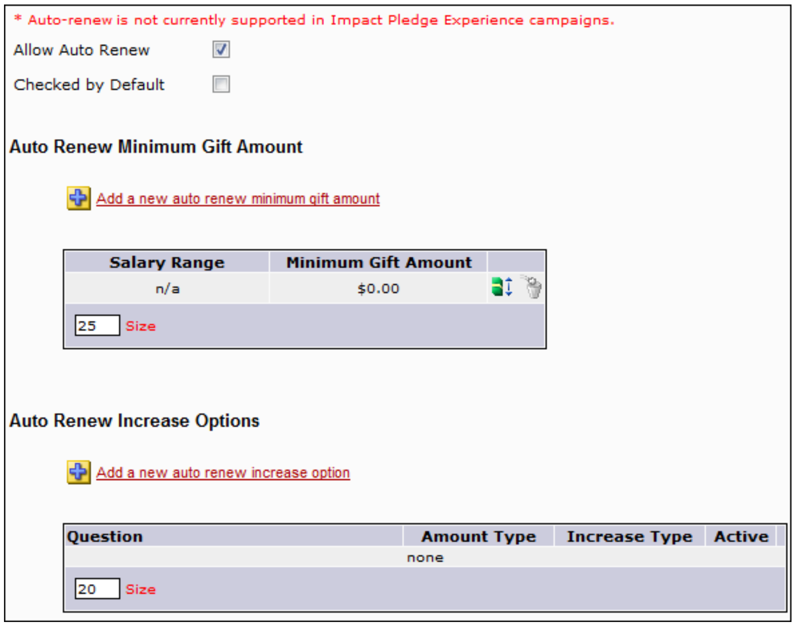


2. Remember to activate the continuous giving confirmation increase options, by clicking the stoplight, turning it red. Green stoplights indicate the setting is inactive.

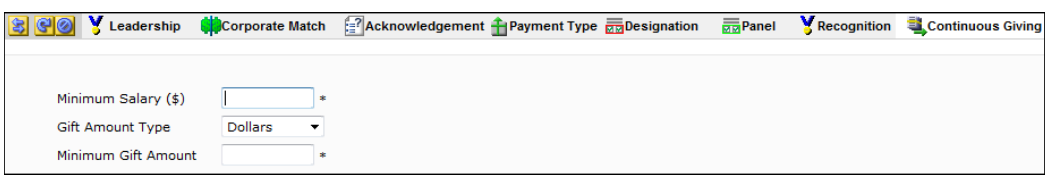
3. If the "**Allow Auto Renew**" field is checked, options to set the auto renew minimum gift amount and to set the auto renew increase options will populate on the page.

   Multiple salary ranges within the auto renewal may be configured. This creates a conditional control for donors associated to this option, according to a combination of the donor's salary and/or donation amount. Auto renewal increase options may be configured to allow donors to indicate whether they would like their gift increased the following year, when their gift is renewed.

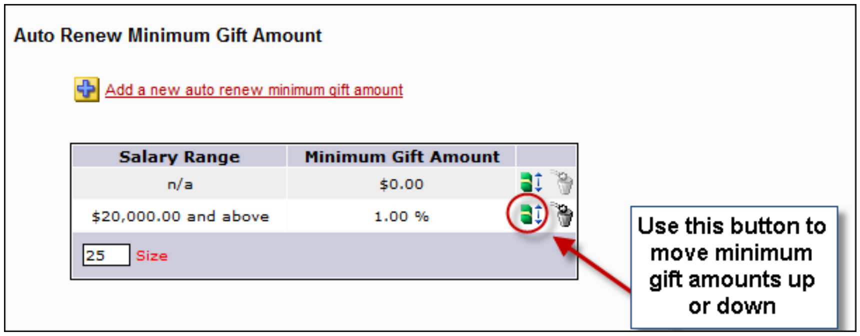
Note: Auto Renew is not supported in Impact Pledge Experience (IPE) campaigns.



4. Click Add a new auto renew minimum gift amount to add an auto renew minimum gift amount.
5. Fill in the appropriate information in the fields provided.



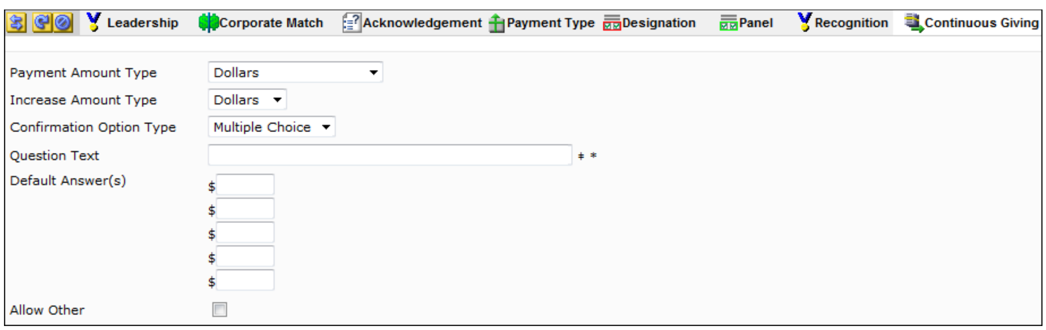
6. Click Save / Update.



7. Click Add a new auto renew increase option to add auto renew increase options.

8. Fill in the appropriate information in the fields provided.

   Note: You must provide the same payment amount type options as you did the in the previous year's campaign in order for donors to increase their gifts in Continuous Giving campaigns. Donors will only see the payment type increase option that they chose.



9. Click Save / Update
10. Remember to activate the continuous giving confirmation increase options by clicking the stoplight and making it red. Green stoplights indicate the setting is inactive.

2. Create an Option Package

Option Packages are a set of bundled Option Sets that are associated to your campaign and can be overridden for specific donor groups. Multiple Option Packages with differing Option Sets can be configured as needed by your organization. However, a single Option Package may be associated to multiple campaigns with the same required business rules. The following Option Sets are required when creating an Option Package:

- Payment Type Option Set
- Designation Option Set
- Designation Panel Option Set

For Continuous Giving Campaigns, it is also required to include the Continuous Giving Option Set in your Option Package.

To create an Option Package take the following steps:

1. From the Organization level, expand Option Sets > Packages.

2. Click 

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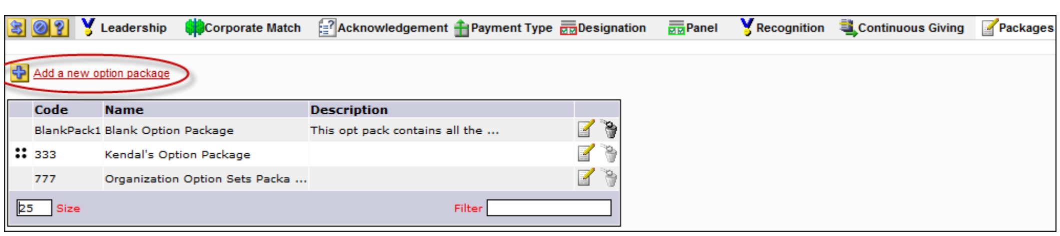
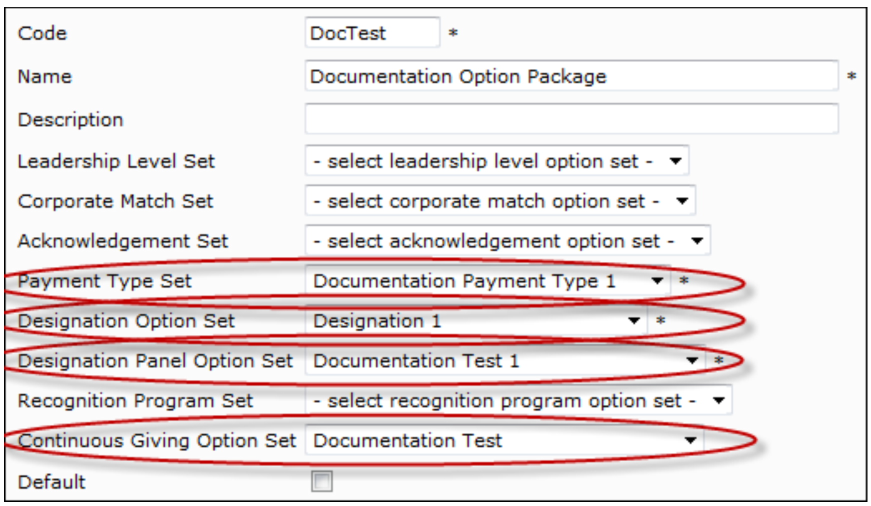


3. Enter a Code and Name for the Option Package.

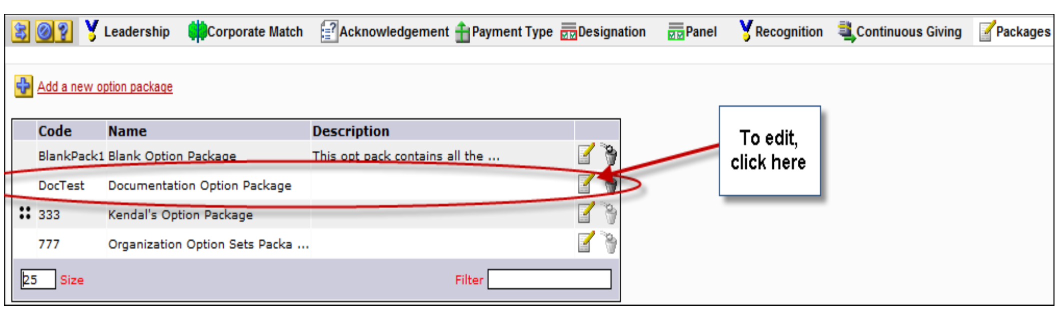
Note: Always name packages very intuitively or develop a naming convention at the Organization level to ensure packages are easily identified. For example, “Carly’s Cakes 2011” is more identifiable than “Option Package 1” or “CC2011.”

4. Select the Option Sets you wish to include in your Option Package. Remember for a Continuous Giving Campaign, you must include:

   - Payment Type Option Set
   - Designation Option Set
   - Designation Panel Option Set
   - Continuous Giving Option Set



5. Click Save / Update. Your new Option Package will show up in the list of Option Packages.



3. Apply Option Package to Campaign

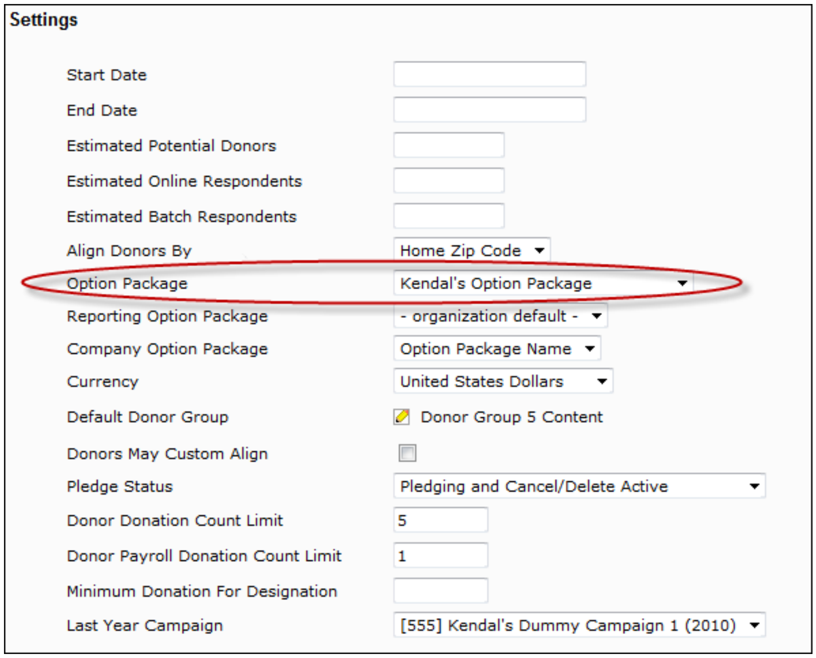
After you have created an Option Package with the appropriate settings configured for a Continuous Giving campaign, you must associate that Option Package to your campaign.

Take the following steps to associate an Option Package to a campaign:

1. From the Campaign level, select your campaign > Settings > Option Package field.

Note: The Option Package may also be brought down to the Donor Group level to offer different options to different donor groups. To do this, expand your campaign > Donor Groups > a specific donor group > Settings > Option Package field.

2. In the Option Package field, select your Option Package from the dropdown menu.



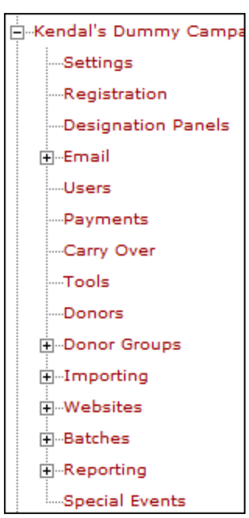
3. Click Save / Update.

4. Identify the Previous Year's Campaign

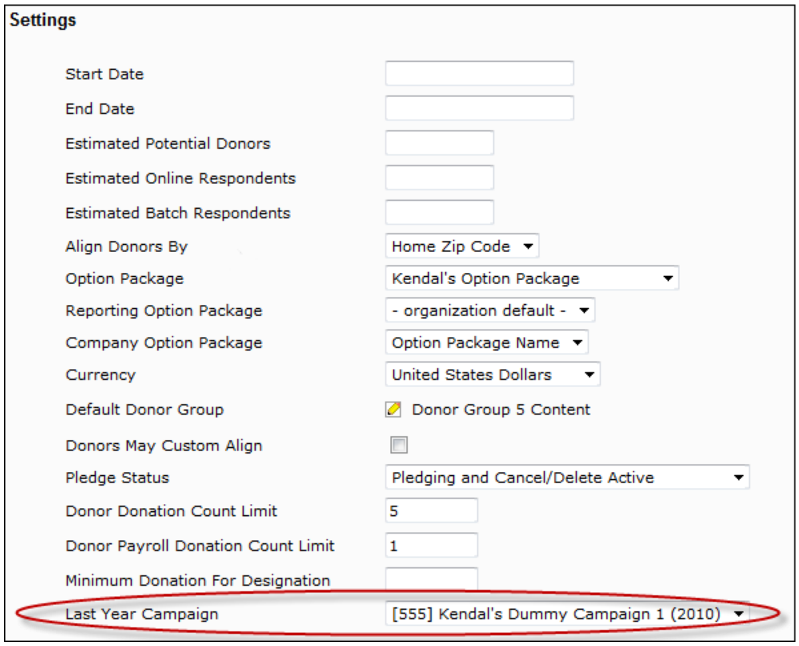
Prior to using the carry over tool, you must identify last year's campaign in your current campaign.

To define last year's campaign, take the following steps:

1. Open the Campaign level > your campaign > Settings.



2. In the "**Last Year Campaign**" field, select last year's campaign from the dropdown menu.



3. Click Save / Update .
4. After last year's campaign has been identified, the Carry Over option will display in the navigation tree.

Note: It may be necessary to close and reopen your campaign in the navigation tree in order for the Carry Over option to show up.

5. Upload a Current Donor File

Before you can execute the carry over, you must ensure all last year's donors are in this year's campaign so that the carry over tool can update their previous designation and donation information. To do this, import a current donor file into the system. For more information, see further documentation, *The New Admin's Guide to Campaign Management*.

6. Execute a Carry Over

The carry over tool allows you to carry over donations from one campaign to another without the need to export donations and import them into a new campaign via the donation import. The carry over function defines a set of rules to use when carrying over a donation from a previous campaign.

To use the carry over tool, take the following steps:

1. From your campaign, select the Carry Over tool in the navigation tree.

2. Click 

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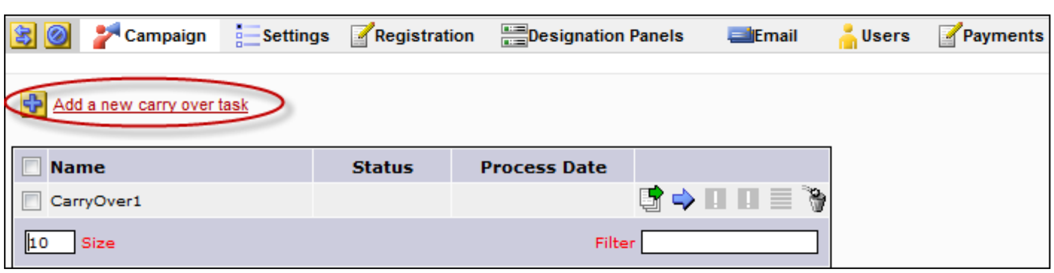
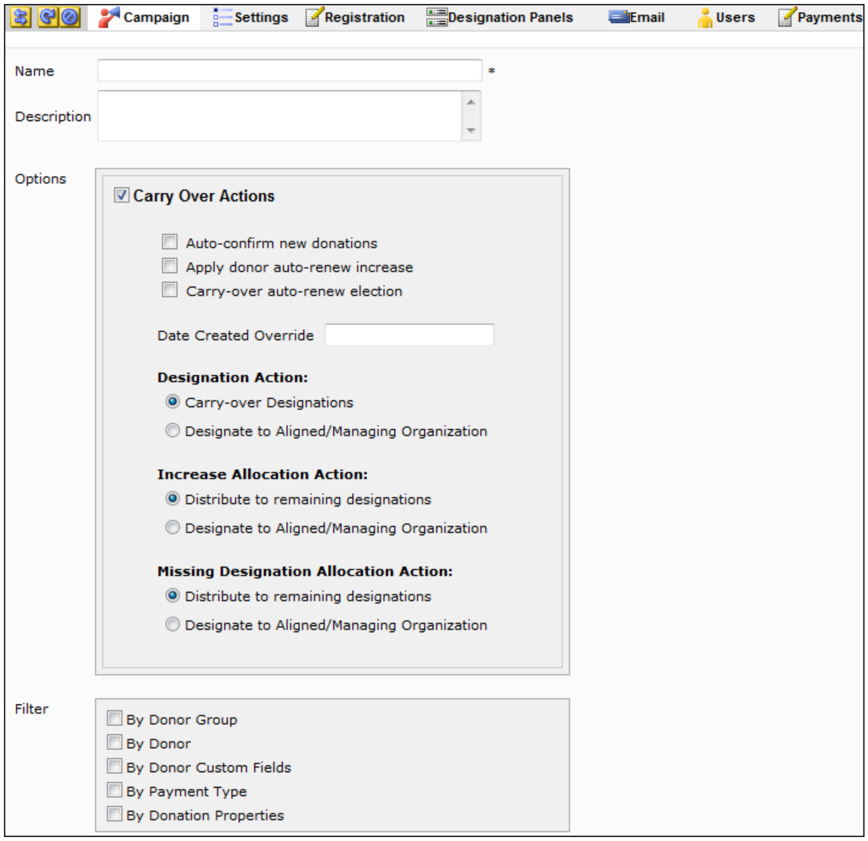


3. Give your carry over task a name and select the desired carry over actions.



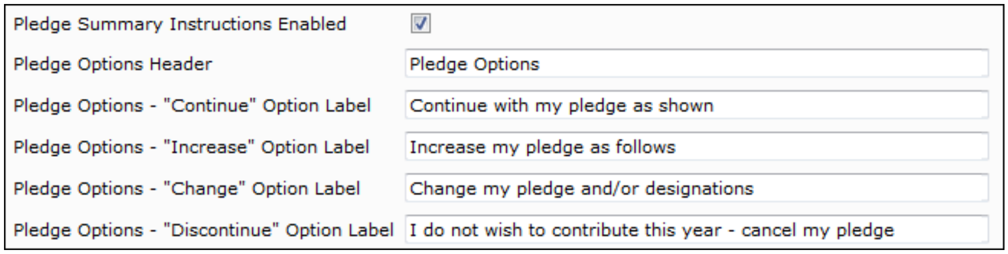
Carry Over Task Options		
	Field	Description
Carry Over Actions	Auto- confirm new donation	When the auto-confirm option is enabled, carry over donations within the task will have a "confirmed" status. **Note:** All of the increase options configured in the Continuous Giving Option Set will not display to the donor because they are only available to **unconfirmed gifts**.
	Apply donor auto-renew increase	If auto-renew increase option was applied in the previous year's campaign, checking this box will cause the donation to automatically increase by the auto-renew increase amount specified by the donor in the previous campaign.
	Carry-over auto-renew election	Carries over the donor's last year's auto-renew setting. This allows the donor to mark "yes" or "no" to auto-renew with the same amount/increase next year.

Carry Over Task Options		
	Field	Description
	Date Created Override	Allows you to enter a date that the donor will see as the date they created the auto-renew. If you do not provide an override date, whatever date you execute the carryover job will be the date the donor will see as the date they chose to use auto-renew.
Designation Action	Carry-Over Designations	Designations will be made to the same agencies, etc as specified by the donor in the previous campaign.
	Designate to Aligned/Managing United Way	Designations will be made to the Aligned/Managing United Way during the carry over task.
Increase Allocation Action	Designate to Aligned/Managing United Way	Additional dollars are designated to the Aligned Managing United Way.
	Distribute to remaining designations	Additional dollars are distributed to designations specified by the donor in the previous campaign.
Missing Designation Allocation Action	Designate to Aligned/Managing United Way	Applies designation dollars to the Aligned/Managing United Way.
	Distribute to remaining designations	Applies designation dollars evenly to the remaining designations specified by the donor during the previous year campaign.

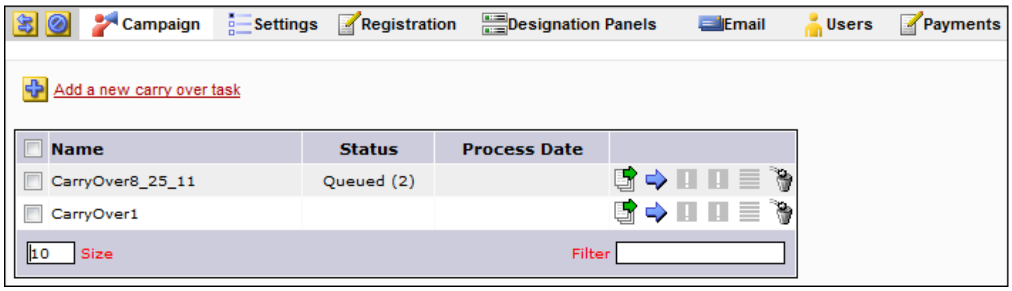
Filters apply to the previous campaign selected in the Campaign Settings. The filter criteria selected will restrict the donations in the previous campaign from the carry over task. For example, to carry over only Payroll Type donations from a previous campaign, set filter criteria for Payment Type = Payroll. Please note that you can no longer carry over credit card information.

4. Click Save / Update.

Note: At the Campaign level, via Website > Content > Confirmation Page, you have the ability to customize text for the "**Continue**," "**Increase**," "**Change**," and "**Discontinue**."



5. To execute the task, click the blue arrow ( ).



= View/Edit the task = Execute the task = View error file

= View warning file = View log file = Delete task

6. This completes the carry over task for your campaign. All selected designation and donation information will be available for the donors in the system.

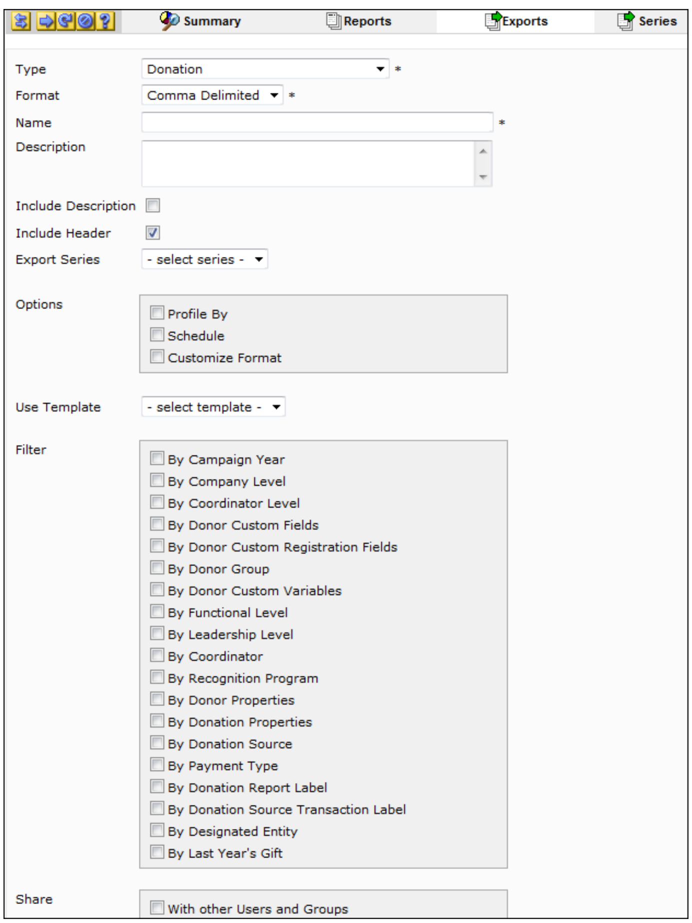
Using the Donation Import Instead of Executing a Carry Over

As an alternative to using the Carry Over tool, you can do a donation import for Continuous Giving campaigns. A donation import is only used for campaigns that do not have the previous year's history in the system.

Note: Using the Carry Over tool is the recommended method for Continuous Giving Campaigns. See steps above for details on executing a Carry Over.

If you choose to use the donation import, rather than the Carry Over tool, take the following steps:

1. Download last year's designation and pledge information from your legacy system or acquire a file from the company.
2. Include all possible previously designated Agency Codes in your iGuide profiles or OPPS Agency list.
3. From this year's campaign, at the Campaign level > Importing, upload the Continuous Giver information to the campaign with the Donation Upload.



4. Click Generate.

5. Once the status is complete, all designation and donation information will be available for each donor in last year's campaign.

Additional Notes

- Multiple donor groups and websites can be configured within a campaign to deliver different content to donors with continuous gifts, versus donors that do not opt to be continuous givers in a previous campaign.

- Campaign pledge bars can be configured to include unconfirmed gifts in their display by selecting "**Include Unconfirmed Donations in Totals**" on the Campaign Settings page of OPPS. Selecting this option will count the unconfirmed donations in the pledge bar displays for both the Campaign level and the Donor Group level. As a result, the donation counts on the Campaign Summary Quick Stats page will reflect this option.

- Many of the reports and exports can be filtered by confirmed, versus unconfirmed donations. This filter enables the United Way to identify donors that may have confirmed or modified their donations.

- Donations made through online campaigns or batches are considered "**confirmed**." When both continuous givers and new donors are combined in a campaign for reporting purposes, it is recommended to create at least two donor groups; one for continuous givers and one for new donors.

- Because credit cards, cash, and checks must be manually submitted by the donor, but payroll deductions can occur automatically on a regular basis, a payroll pledge type is the recommended payment type for carry overs.

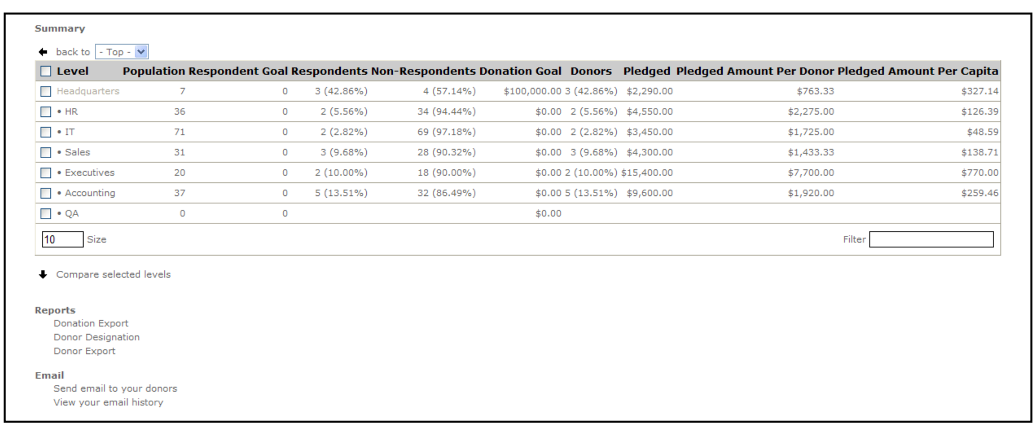
Dashboard Configuration - Introduction

The Campaign Dashboard allows the Campaign Coordinators to easily access campaign statistics, generate reports / exports, and send email without ever leaving the Donor Site. Use of the Dashboard:

- Streamlines Coordinator access to track campaign results – no need for a separate administrator login
- Decreases the number of people requiring access to the Administrator Site
- Simplifies training for Campaign Coordinators by limiting the access to administrative functions
- Provides Coordinators with the ability to track campaign progress in real-time – 24/7/365.
- Facilitates employee engagement through the use of targeted email
- Reduces the number of files required by the client to set up the campaign since Coordinator access and security roles are assigned through the donor import file.

By empowering Campaign Coordinators with the dashboard tools, they are better able to engage donors in a meaningful way – resulting in increased participation and greater campaign success.

Below are screenshots of the donor experience when Dashboard is activated:



Summary

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Level	Population	Respondent Goal	Respondents	Non-Respondents	Donation Goal	Donors	Pledged	Pledged Amount Per Donor	Pledged Amount Per Capita
Headquarters	7	0	3 (42.86%)	4 (57.14%)	$100,000.00	3 (42.86%)	$2,290.00	$763.33	$327.14
• HR	36	0	2 (5.56%)	34 (94.44%)	$0.00	2 (5.56%)	$4,550.00	$2,275.00	$126.39
• IT	71	0	2 (2.82%)	69 (97.18%)	$0.00	2 (2.82%)	$3,450.00	$1,725.00	$48.59
• Sales	31	0	3 (9.68%)	28 (90.32%)	$0.00	3 (9.68%)	$4,300.00	$1,433.33	$138.71
• Executives	20	0	2 (10.00%)	18 (90.00%)	$0.00	2 (10.00%)	$15,400.00	$7,700.00	$770.00
• Accounting	37	0	5 (13.51%)	32 (86.49%)	$0.00	5 (13.51%)	$9,600.00	$1,920.00	$259.46
• QA	0	0			$0.00				

10 Size Filter

Compare selected levels

Reports
Donation Export
Donor Designation
Donor Export

Email
Send email to your donors
View your email history

Dashboard Configuration

The steps for setting-up Dashboard are as follows:

- Configure Coordinator Levels
- Create Coordinator Option Set
- Configure Coordinator Roles
- Add Coordinator Option Set to Company Option Package
- Associate Company Option Package to Campaign
- Associate Donors with Coordinator Levels *
- Assign Coordinator Role to Donor *
- Assign Reporting Levels*

It is important to note that the Dashboard settings are primarily configured at the Company Level of the Navigation Tree. Therefore, they once they have been established the Dashboard can be easily activated for use with multiple campaigns within a single company simply by associating the Company Option Package to the campaign.

See the sections that follow for step-by-step instructions for completing each of the above set-up steps.

1. Configure Coordinator Levels

Coordinator Levels are a hierarchical representation of reporting levels, similar to a family tree or an organization chart of a corporation. Coordinator Levels group donor records to which you can assign Campaign Coordinator access to through the Dashboard. If desired, a multi-layer Coordinator Level hierarchy can be established providing a coordinator the ability to view a subset of donors as well as all of the donors they are responsible for.

For example in the illustration below, a Coordinator assigned to 'Coord-1' would have access to donors associated to Coord-1, Coord-1.1, Coord-1.1.1, Coord-1.2, and Coord-1.3. But would NOT have access to donors associated to any of the other Coordinator Levels, i.e. Coord-2.

Name	Code	Depth
Coord-1	Coord-1	1
Coord-1.1	Coord-1.1	2
Coord-1.2	Coord-1.2	2
Coord-1.3	Coord-1.3	2
Coord-2	Coord-2	1
Coord-2.1	Coord-2.1	2
Coord-2.2	Coord-2.2	2
Coord-3	Coord-3	1
Coord-3.1	Coord-3.1	2
Finan-3.1	Finan-3.1	3

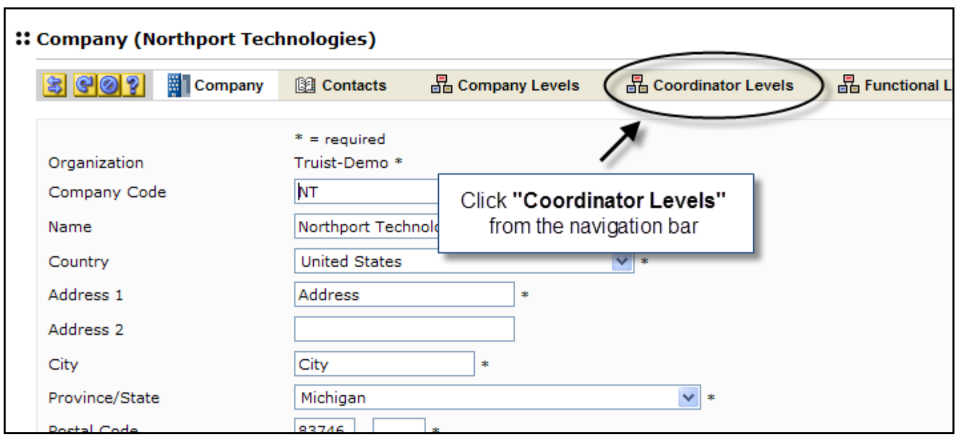
10 Size First | Previous Page 1 of 2 Next | Last Filter

Coordinator Levels are configured at the Companies level and can be created manually or via a Coordinator Level Import file. Below are step-by-step instructions for manually creating Coordinator Levels.

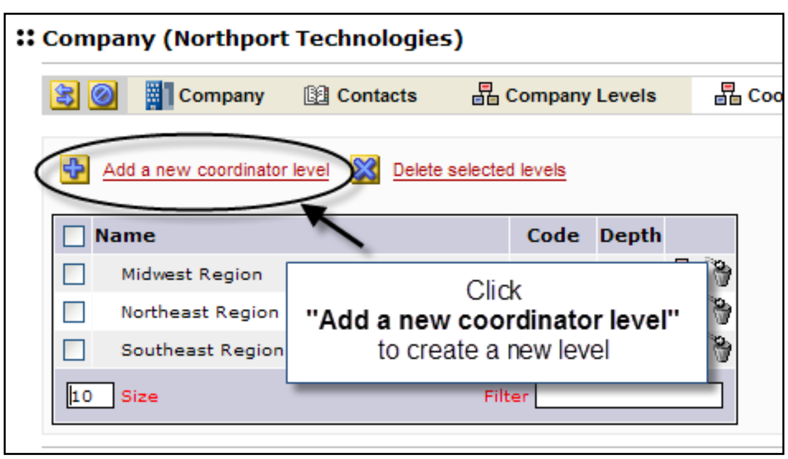
Note: For companies with complex Coordinator Hierarchies it is recommended that the Coordinator Levels be created via a file import. Refer to the Coordinator Level Import file specification and file import help documentation for details.

1. Select Companies from the left navigation tree to access the **Company List** page.
2. If necessary, Filter the list of companies to find your Company
3. Click the icon next to the Company Name for the company you wish to work with to access that Company's profile page.

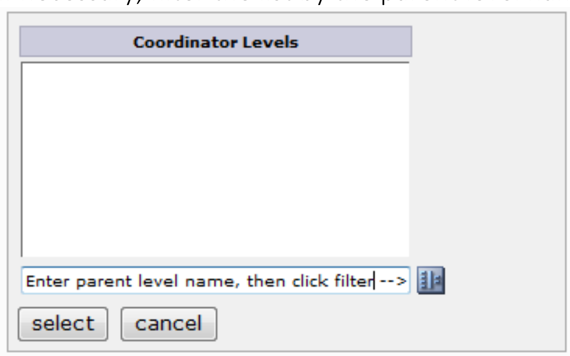
4. Click the "Coordinator Levels" link on the top navigation bar.



5. Click "Add a new coordinator level".

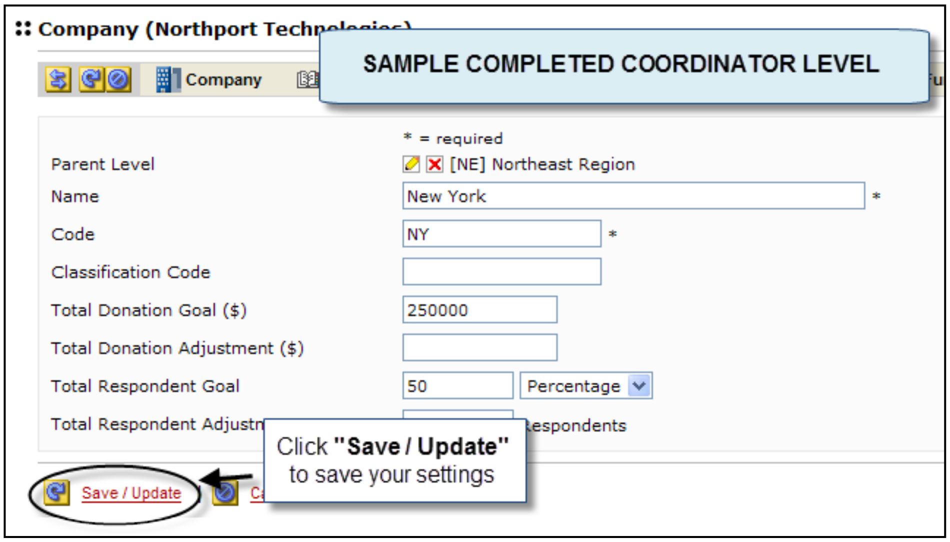


6. Enter the required and desired optional information to define the Coordinator Level.
Note: Required fields are indicated by an asterisk (*).

Coordinator Level Fields		
Req	**Field**	**Description**
	Parent Level	Denotes the level above the one you are creating – thus creating a parent – child relationship between the two levels. Applies only when creating a hierarchical reporting structure. To do this, follow the steps below: • click the icon to display a list of available Coordinator Levels • if necessary, filter the list by the parent level name  • • select the “parent level name” from the list • click the <select> button
*	Name	This is the name that will be used to identify the Coordinator Level on the Dashboard and within reports / exports.
*	Code	This is the code associated with the coordinator level. The code is used in the Donor Import File to associate donors to the coordinator level.
	Classification Code	ADVANCED FUNCTIONALITY – For use by FrontStream staff only.
	Total Donation Goal	Dollar goal for donors within the coordinator level. Note: The amount recorded here will be used to calculate and display percent of goal on the Dashboard Statistics.
	Total Donation Adjustment	Allows you to adjust the total dollars raised towards goal by either a positive or negative number.
	Total Respondent Goal	Participation goal for the coordinator level. Value can be entered as either the actual number of respondents, or as a percentage of the Estimated Potential Donor Count established for the donor group. Note: The amount recorded here will be used to calculate and display percent of goal on the Dashboard Statistics.
	Total	Allows you to adjust the total respondent rate by either a

Coordinator Level Fields		
Req	Field	Description
	Respondent Adjustment	positive or negative number.

7. Click **"Save / Update"** at the bottom of the page to save your settings.



8. Repeat steps 4 – 6 until all desired Coordinator Levels have been created.

2. Create Coordinator Option Set

The Coordinator Option Set contains one or more Coordinator Roles that define the coordinator user experience when viewing the dashboard. The Coordinator Option Set also controls participation rules and other dashboard options that will be applied to across all Coordinator Roles linked to it.

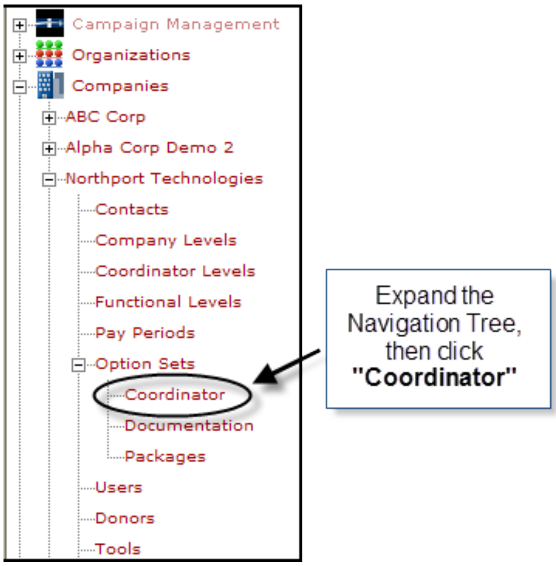
These are set up at the Companies level and may be used across multiple campaigns within that company. Follow the steps below to create a new Coordinator Option Set:

1. Select Companies from the left navigation tree to access the **:: Company List** page.
2. If necessary, Filter the list of companies to find your Company
3. Click the icon next to the Company Name for the company you wish to work with to access that Company's profile page.

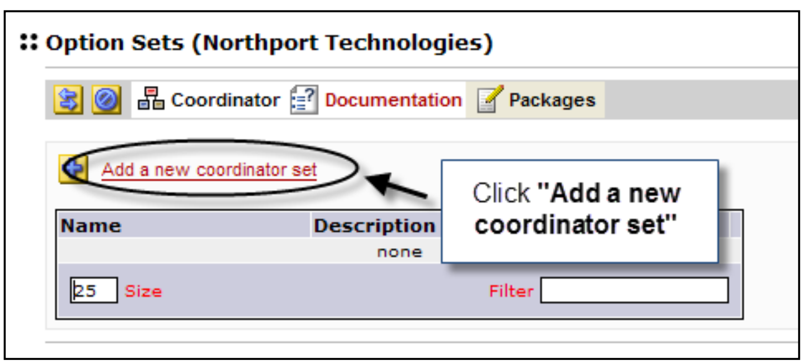
4. Click the icon on the top navigation bar to sync the navigation tree to the selected company.

5. Click the next to **Option Sets** to expand the navigation tree further.

6. Click **Coordinator** to access the ***Coordinator Option Sets*** page.



7. Click **"Add a new coordinator set"**.

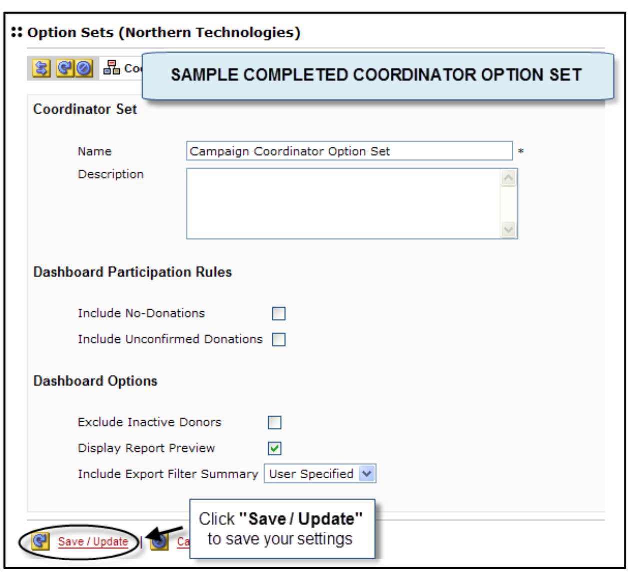


8. Enter the required and desired optional information to define the Coordinator Option Set. ***Note:*** Required fields are indicated by an asterisk (*).

Coordinator Option Set Fields		
Req	Field	Description
*	Name	This is the name that will be used to identify the Coordinator Option Set.
	Description	Can be used to provide additional details.
	Include	If checked, individuals making a "No Donation" pledge will

Coordinator Option Set Fields		
Req	**Field**	**Description**
	No-Donations	be counted as having participated in the campaign. However, they will not be counted as a donor. **Note:** The default is "unchecked" which indicates these individuals will not count as campaign participants.
	Include Unconfirmed Donations	If checked, unconfirmed donations will be presented in the same manner as a confirmed donation on the dashboard. **Note:** The default is "unchecked" which will not include these transactions in the dashboard statistics.
	Exclude Inactive Donors	If checked donors marked as "inactive", and any associated transactions, will be excluded from the campaign statistics. **Note:** The default is "unchecked" which will include these transactions in the campaign statistics.
	Display Report Preview	If checked a preview of the report results will be displayed on the Dashboard page. **Note:** By default this is "checked" resulting in the report preview display.
	Include Export Filter Summary	Determines whether or not the report filter criteria is included when the data is exported – *select 'Never', 'User Specified' or 'Always' from the list.* **Note:** The default is 'Never'.

9. Click **"Save / Update"** at the bottom of the page to save your settings.



3. Configure Coordinator Roles

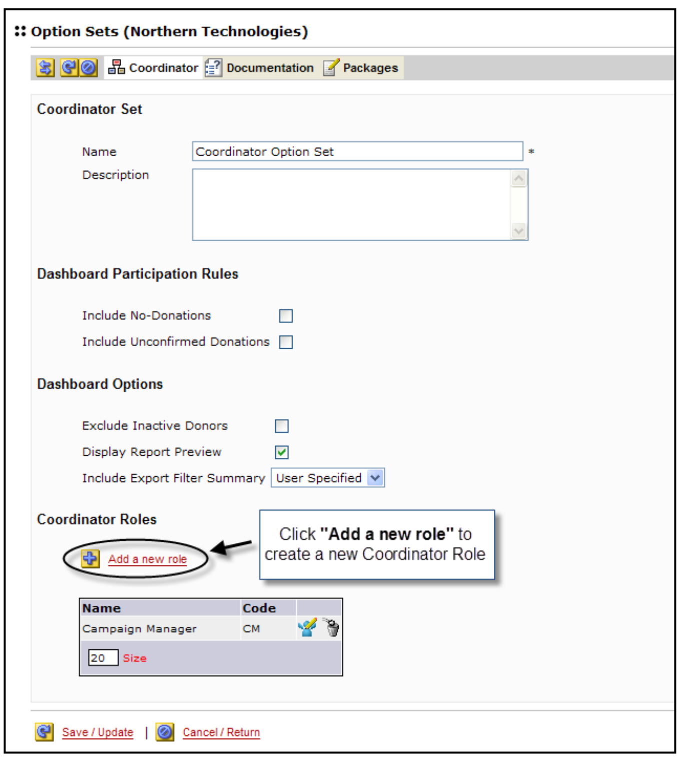
Coordinator Roles are used to define a set of permissions and saved reports for the Dashboard. Within each role you can define the following:

- Columns that display in the Campaign Summary
- Fields that display on the Report Preview
- Email access and capabilities
- Data export access

Coordinator Roles are configured within the Coordinator Option Set. A single Coordinator Option Set may contain multiple Coordinator Roles.

See instructions in Section B above to create a Coordinator Option Set prior to configuring the Coordinator Roles. Once created follow the steps below to configure the Coordinator Roles.

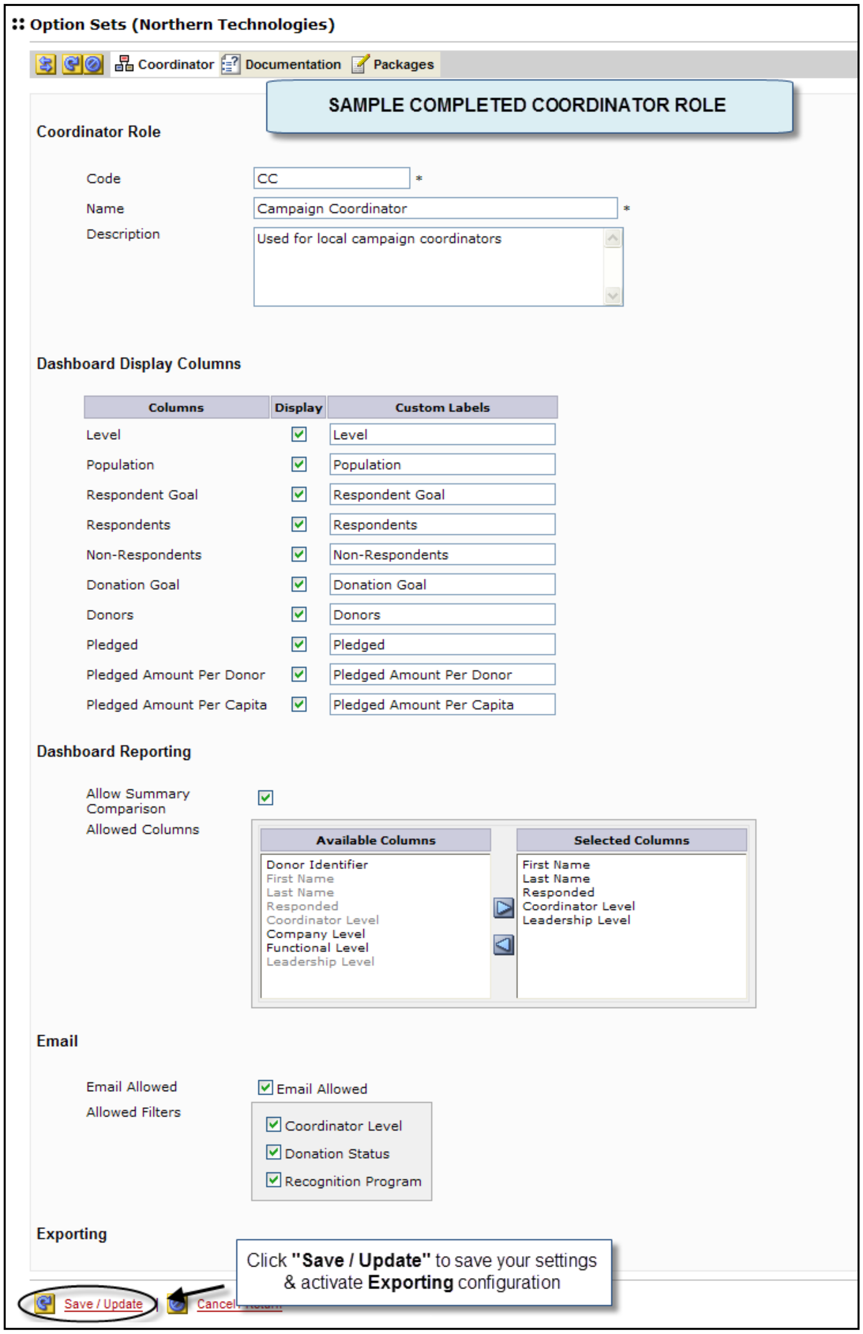
1. Click "**Add a new role**". **Note:** This link will appear at the bottom of the Coordinator Option Set profile page after saving a new option set.



2. Enter the required and desired optional information to define the Coordinator Role. ***Note:*** Required fields are indicated by an asterisk (*).

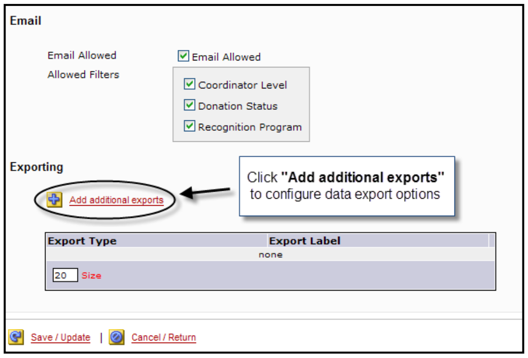
Coordinator Role Fields		
Req	**Field**	**Description**
*	Code	This is the code associated with the coordinator role. The code is used in the Donor Import File to associate donors to the coordinator role and grant that individual access to the Dashboard.
*	Name	This is the name that will be used to identify the coordinator role.
	Description	Can be used to provide additional details.
	Dashboard Display Columns	Indicates which fields will be included on the Campaign Summary visible via the Dashboard – *check the box next to the field name to include it on the summary. If desired, enter a 'custom label' that will be used as the column header for a particular field.* Note: By default all fields are included with system default column labels.
	Allow Summary Comparison	Determines whether the summary comparison functionality is available. This functionality allows the coordinator to select the levels they wish to compare then add them to the comparison grid for side-by-side review – *check the box to activate this feature.* Note: This feature is 'inactive' (unchecked) by default.
	Allowed Columns	Indicates which fields display on the report preview when 'Display Report Preview' is activated in the Coordinator Option Set. Note: All fields are selected by default. Follow the steps below to deselect: • In the 'Selected Columns' field highlight the field(s) you wish to deselect • Click the icon to remove them from the 'Selected Columns' list
	Email Allowed	Determines whether the email functionality is available. This functionality allows the coordinator to send emails to donors in his/her assigned coordinator level(s) - *check the box to activate this feature.* Note: This feature is 'inactive' (unchecked) by default.
	Allowed Filters	Indicated which filters / queries are available to the coordinator when the email functionality is activated – *check the box next to the filter name to allow that filter.* Note: All filters are 'active' (checked) by default.

3. Click **"Save / Update"** at the bottom of the page to save your settings and activate the **Exporting** configuration area.

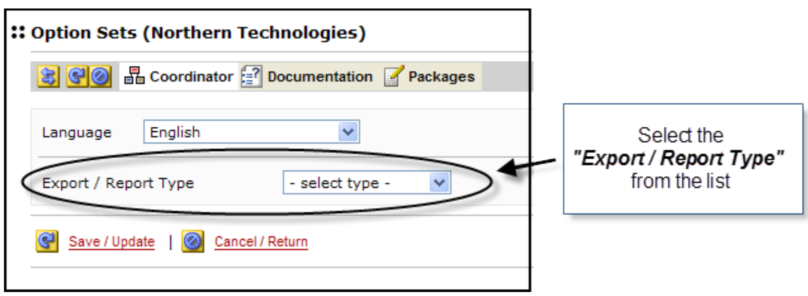


4. If desired the coordinator can be given access to donor and/or donation details via the Dashboard Exporting feature. Follow the steps below to configure these optional exports.

a. Click **"Add additional exports"**. **Note:** This link will appear at the bottom of the Coordinator Role profile page after saving a new role.



b. Select the ***"Export / Report Type"*** from the drop down list. Refer to the Report / Export documentation and sample exports on the User Support Site for additional information about each report option.

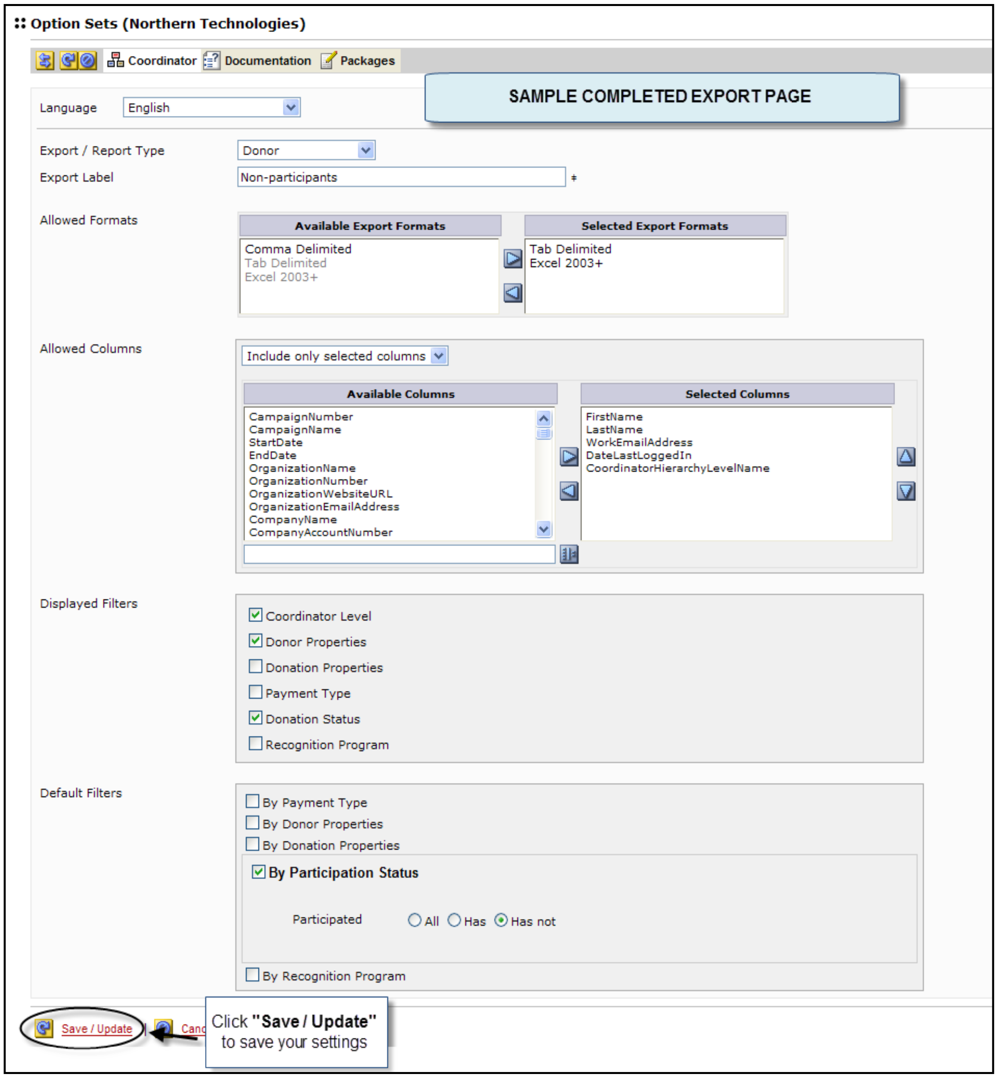


c. Once the ***"Export / Report Type"*** is selected additional export configuration fields will appear. Enter the required and desired optional information to define the export. ***Notes:*** Required fields are indicated by an asterisk (*).

Coordinator Role Export Fields		
Req	**Field**	**Description**
	Language	PLACEHOLDER FOR FUTURE FUNCTIONALITY
	Export Label	Establishes a customized name for the export when viewed on the Dashboard. **Note:** If left blank the export / report type label will be used.
*	Allowed Formats	Denotes the available file format option(s). At least one format must be selected. Follow the steps below to select: • In the 'Available Export Formats' box highlight the format(s) you wish to allow • Click the icon to add them from the 'Selected Export Formats' list
	Allowed Columns	Establishes what fields will be included in the export.

Coordinator Role Export Fields		
Req	Field	Description
		Configuration varies based upon the type of report selected. Refer to the documentation on Exports for information on configuring exports and flexports. **Note:** The field name will be listed as "Customize Columns" if a "flexport" is selected as the Export / Report Type.
	Displayed Filters	Denotes which filters / data queries will be accessible via the dashboard – *check the box next to the desired filter names to activate them.* **Note:** By default the filters are 'inactive' (unchecked).
	Default Filters	Establishes the default data filters /queries that will be applied to the export and cannot be changed by the coordinator on the dashboard – *to activate check the box next to the desired filter name then enter the desired default value.* **Note:** By default the filters are 'inactive' (unchecked). **Note:** If the filter is included as an active "Displayed Filter" the coordinator will be able to override this default prior to generating the export. If the filter is inactive then this filter will be applied each time the export is generated.

d. Click **"Save / Update"** at the bottom of the page to save your export.



e. Repeat steps a – d to create additional exports.

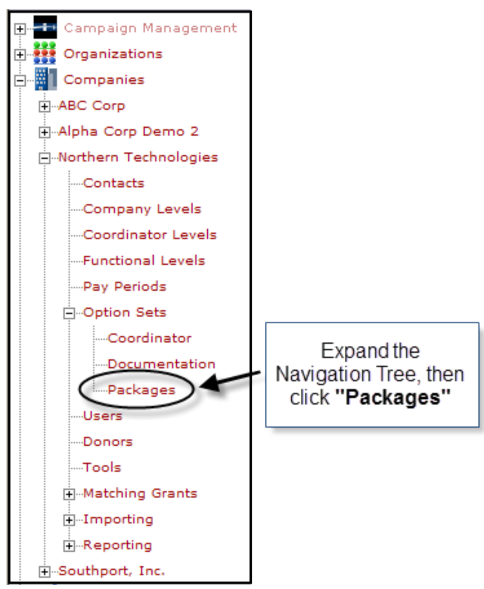
4. Add Coordinator Option Set to Company Option Package

Once created the Coordinator Option Set gets bundled into a Company Option Package. This package, and the Coordinator settings contained within it, can then be associated with one or more campaigns associated with that company.

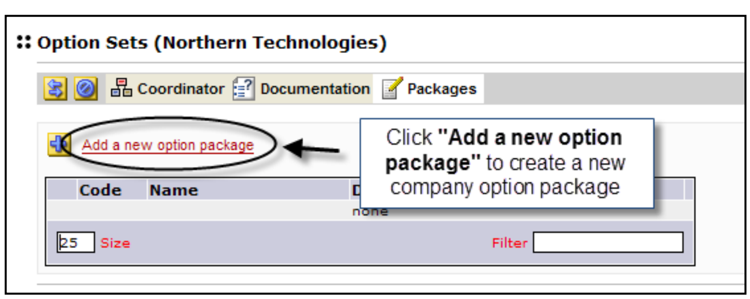
Company Option Packages are set up at the Companies level. Follow the steps below to associate the Coordinator Option Set to a Company Option Package:

1. Click the ⊞ next to **Option Sets** to expand the navigation tree.

2. Click **Packages** to access the ***Company Option Packages*** page.



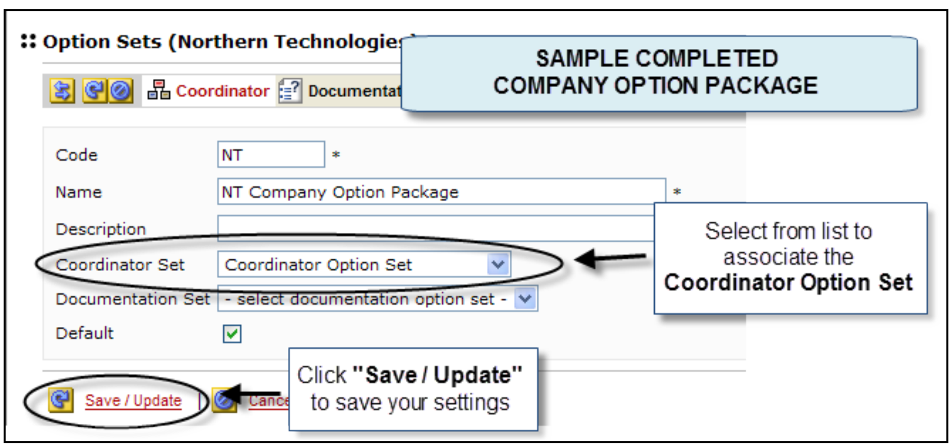
3. Click **"Add a new option package"**.



4. Enter the required and desired optional information to define the Company Option Package. ***Note:*** Required fields are indicated by an asterisk (*).

Coordinator Role Fields		
Req	**Field**	**Description**
*	Code	This is the code associated with the company option package.
*	Name	This is the name that will be used to identify the company option package.
	Description	Can be used to provide additional details.
*	Coordinator Set	Denotes the Coordinator Option Set associated with the Company Option Package – *select the Coordinator Option Set from the drop down list.*
	Documentation Set	ADVANCED FUNCTIONALITY – This setting does not impact the configuration or use of the Dashboard. This is additional functionality for use by FrontStream in conjunction with Where Raised Reporting.
	Default	Denotes if this Company Option Set should be used as the default setting for campaigns managed under this company – *only check this box if this option set is to be the default for all campaigns.*

5. Click **"Save / Update"** to save your settings.



5. Associate Company Option Package to Campaign

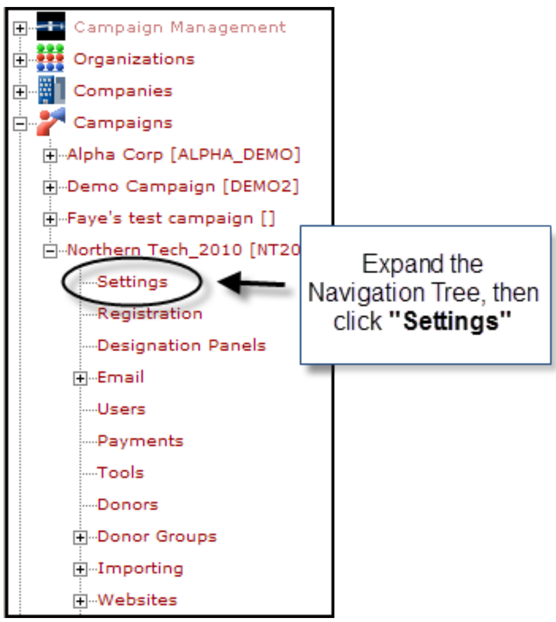
Once created the Company Option Package needs to be associated to the Campaign. This is done in the **Campaign Settings** located at the Campaigns level.

1. Click Campaigns on the Navigation Tree to access the **Campaign List**.

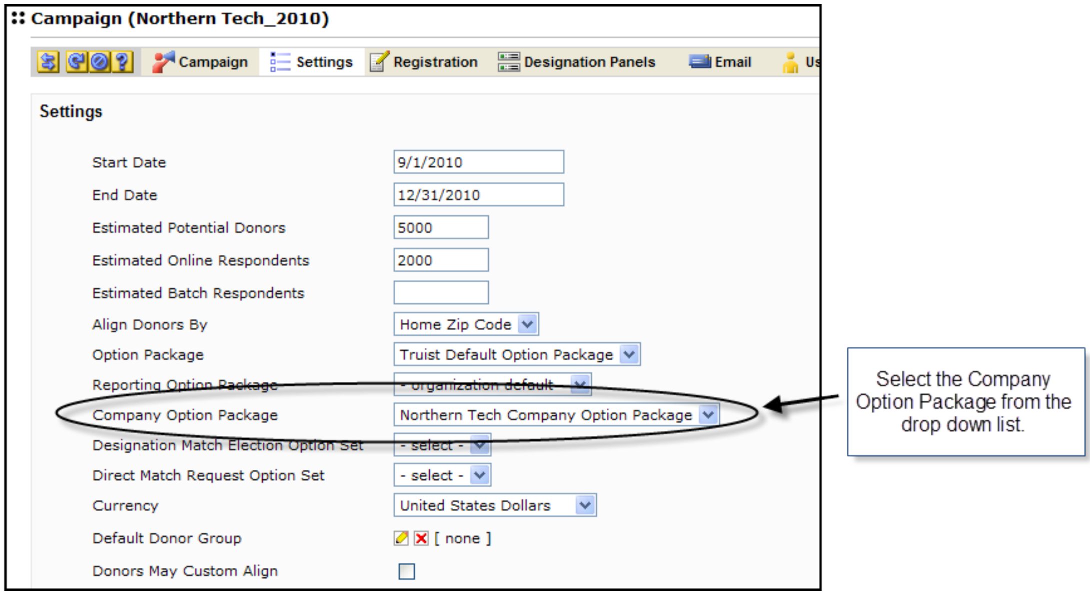
2. Locate your campaign in the list then click the icon next to the campaign name.

3. From the campaign profile page, click the icon to expand the Navigation Tree.

4. Click **"Settings"** to access the Campaign Settings page.



5. Set the **"Company Option Package"** to the company option package containing your desired coordinator option set.



6. Click **"Save / Update"** at the bottom of the page.

6. Assign Coordinator Role to Donor

Donors that are also Coordinators for the campaign are assigned a Coordinator Role, Reporting Coordinator Level and optionally a Summary Coordinator Level. These coordinator settings taken together define the donor's Dashboard user experience and available data.

- **Coordinator Role:** A set of permissions that determines the summary data, exports and email capabilities available to the coordinator via the Dashboard. See *Step C: Configure Coordinator Roles* above for additional details.

- **Reporting Coordinator Level:** The highest coordinator level code that a campaign coordinator is responsible for. The campaign coordinator will be able to view summary level campaign details as well as donors associated to this coordinator level and its children. A coordinator may be assigned multiple reporting levels.

- **Summary Coordinator Level:** Allows coordinators to view summary level campaign numbers for selected coordinator levels without the ability to report on them or email them. A coordinator may be assigned multiple summary levels. **Note:** The summary coordinator levels cannot be the same as the reporting coordinator levels. If added via OPPS Admin or donor import, the coordinator cannot modify the Summary Coordinator Levels they see.

These settings are configured at the Campaigns level and can be set manually via the **Donor Settings** page or via a Donor Import file. Below are step-by-step instructions for manually setting the coordinator settings.

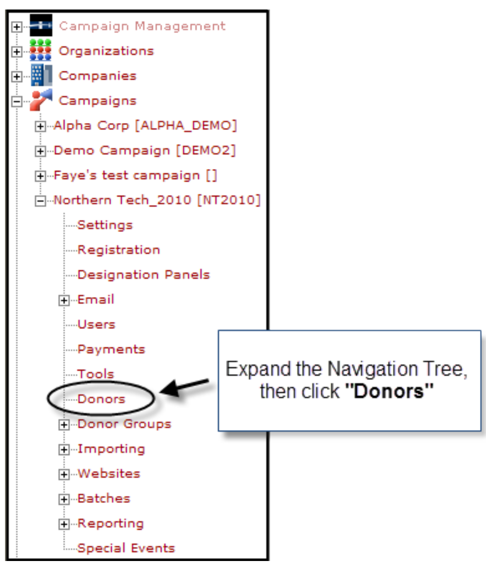
Note: For companies with a large number of coordinators it is recommended that the Coordinator Settings be established via a Donor file import. The associated fields in the Donor file are: #69 – Coordinator Hierarchy Role Code, #77 – Coordinator Hierarchy Reporting Code, #95 – Coordinator Summary Code. Refer to the Donor Import file specification and file import help documentation for additional details.

1. Click Campaigns on the Navigation Tree to access the **Campaign List**.

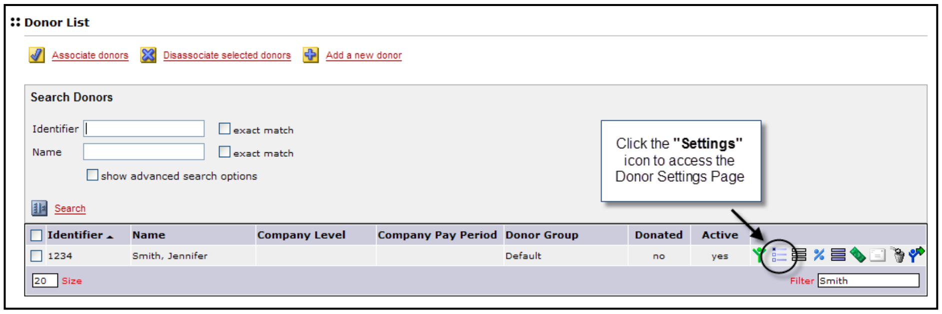
2. Locate your campaign in the list then click the icon next to the campaign name.

3. From the campaign profile page, click the icon to expand the Navigation Tree.

4. Click "**Donors**" to access the Donor List page.



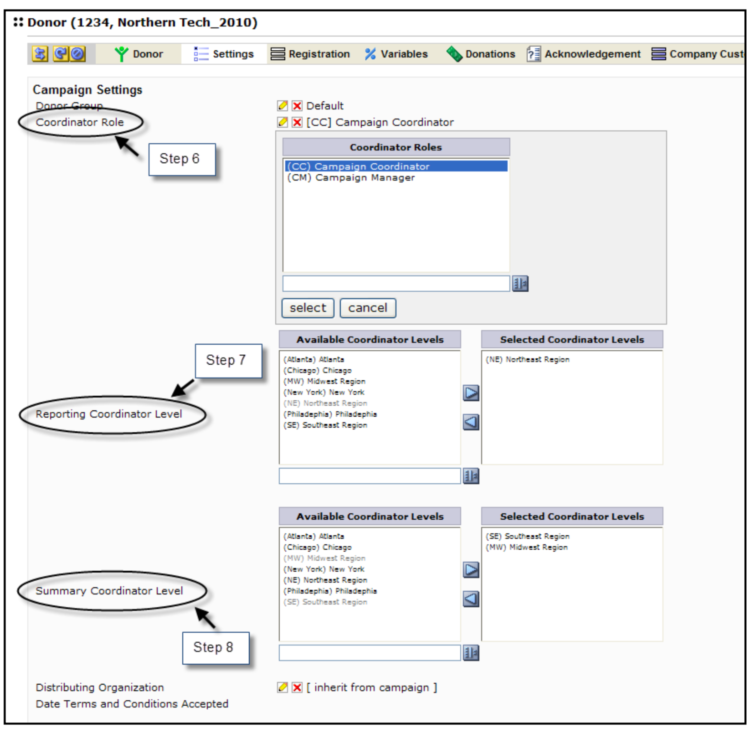
5. Click the icon next to the donor name for which you wish to grant Dashboard / Coordinator access to access the **Donor Settings** page.



6. Associate the donor to a *"Coordinator Role"*.
   a. Click the icon to view the list of available roles.
   b. Highlight the appropriate role with the *Coordinator Roles* box.
   c. Click **"Select"** to save your selection.

7. Associate the donor to the appropriate **"Reporting Coordinator Level"**.
   a. Highlight the appropriate level(s) in the 'Available Coordinator Level' box
   b. Click the icon to add them from the 'Selected Coordinator Level' list

8. If applicable, associate the donor to the appropriate **"Summary Coordinator Level"**.
   a. Highlight the appropriate level(s) in the 'Available Coordinator Level' box
   b. Click the icon to add them from the 'Selected Coordinator Level' list



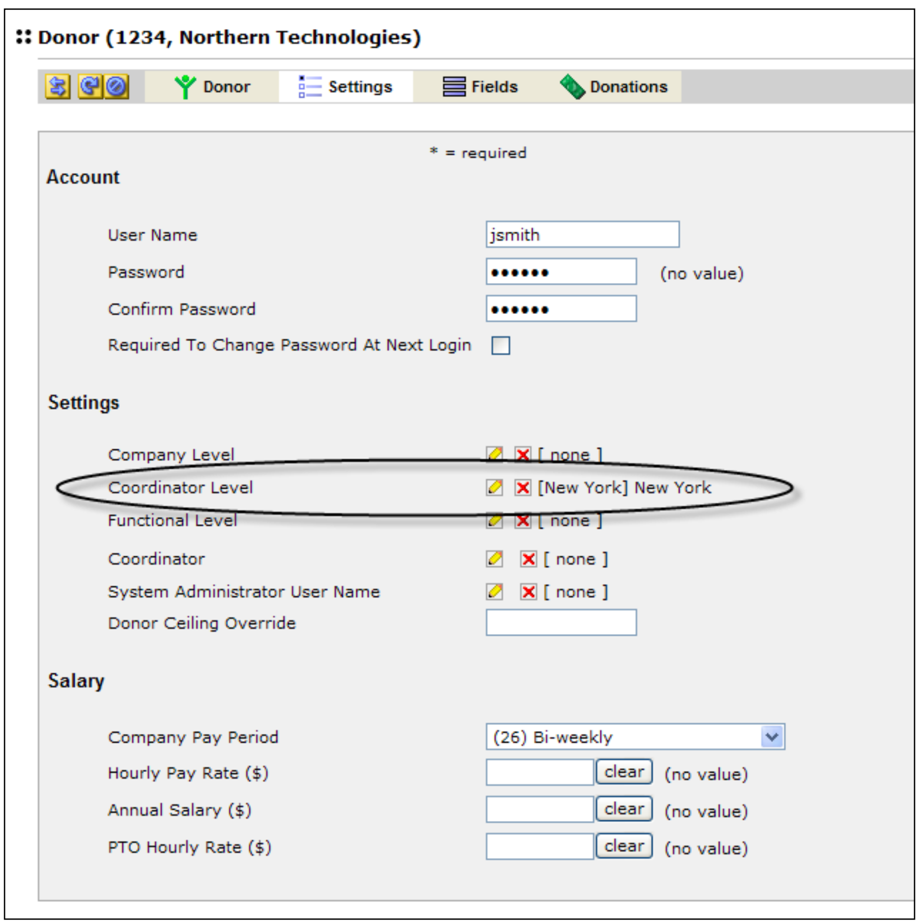
9. Click **"Save / Update"** at the bottom of the page to save your settings.

7. Associate Donors with Coordinator Level

Donors must be assigned to a Coordinator Level in order to be included in the Dashboard reports. The Donor Coordinator Level is can be set at either the Campaigns or Companies level. While the Coordinator Level can be set manually via the **Donor Settings** page, associating donors via a Donor Import file is highly recommended as it is more efficient.

To associate the donor to a Coordinator Level the corresponding "*Coordinator Level Code*" should be included as field *#38 – Coordinator Hierarchy Level Code* in the Donor Import file. Refer to the Donor Import file specification and file import help documentation for additional details.

If you wish to view or edit an individual's Coordinator Level, you can do this via the **Donor Settings** page located at either the Campaigns or Companies level. Below is a screen shot showing that setting.



This screenshot is taken from the company level donor view. The view at the campaign level will be different.